

Leading Diagnostics Company Accelerates Sales Insights with C3 Generative AI



Value-Driven Benefits

2.5

weeks to deploy

3M+

rows of data ingested

50%

reduction in time to identify critical customer data

Introduction

A leading U.S.-based diagnostics company that serves nearly half of the nation's hospitals needed a faster, more reliable way to support its nationwide sales force with up-to-date customer information. With over \$9 billion in annual revenue and thousands of sales representatives supporting hospitals across the country, the company relies on its sales teams to generate revenue and advance the business. Yet reps struggled to access timely account insights, slowing their ability to plan visits, respond to customer needs, and protect at-risk accounts.

Historically, the company's sales force had limited visibility into the status of their accounts, with key details that were difficult to access and slow to retrieve. This made it hard to track account health, plan customer trips, and respond to customer questions in real time. It was difficult for sales reps to identify at-risk accounts as well as potential remedies. As a result, customer relationships and sales performance declined.

The company partnered with C3 AI to deploy C3 Generative AI, an enterprise-grade application that applies large language models to unify enterprise data and delivers real-time insights, natural language search, and decision support. The application ingests customer relationship management (CRM) data daily,

giving sales representatives instant access to up-to-date account details. C3 Generative AI is available on both desktop and mobile, so reps can check data before a trip, in the car, or during a customer meeting. This level of accessibility helps them stay informed and confident — before, during, and after every visit.

Challenges

The company's sales representatives were using a slow, manual process to pull basic CRM data. To prepare for a customer visit, they had to select dozens of fields in a dashboard, export the results to a spreadsheet, and sort through raw data by hand. This method was extremely laborious and time-consuming. Important signals like declining sales or increased churn risk were difficult to identify, and often missed.

The company needed a faster, simpler way for their reps to access necessary data. Sales teams wanted to check account status and plan customer visits without digging through spreadsheets — whether they were prepping weeks in advance or just hours before a meeting. With better visibility into crucial customer metrics, reps could quickly identify and act on customer complaints, building stronger relationships and growing the business.

Solution

C3 AI deployed C3 Generative AI for the company on desktop and mobile platforms. Using queries natural language, sales representatives can instantly pull the latest CRM data on their accounts. Teams now have visibility into at-risk accounts and remedy key issues before customer engagements.

The app includes enterprise-grade access controls, allowing sales reps to see only their own accounts, while management has visibility into trends across the entire sales force. Now, key account insights are surfaced in half the time it took before — helping their sales representatives shift from reactive to proactive in their processes, and take smarter action, sooner.

Results

In two-and-a-half weeks, C3 AI configured C3 Generative AI to enable the company's sales representatives to:

- Identify critical customer account information in half the time of previous methods
- Instantly surface key issues to proactively address customer concerns before they escalate
- Retrieve insights in natural language from desktop or mobile

Inside the Digital Transformation

The company partnered with C3 AI to configure and deploy C3 Generative AI for its nationwide sales force. The joint team began by integrating and ingesting over 3 million rows of CRM data, including account profiles, sales history, service issues, and customer engagement metrics. This data was refreshed daily to ensure real-time visibility into account status.

The team configured the application to support natural language queries, enabling sales representatives to ask simple questions and retrieve account insights instantly across desktop and mobile devices. The solution was designed with enterprise-grade, role-based access controls, ensuring that reps could only view their assigned accounts, while sales leaders maintained visibility across broader organizational trends.

The user interface was optimized for ease of use, especially while on mobile, allowing reps to quickly access key account issues, identify at-risk customers, and prepare for visits with relevant information surfaced quickly. The application's intelligent search capabilities replaced manual dashboard navigation and spreadsheet exports, empowering reps to ask targeted questions and receive actionable answers in seconds.

The deployment of C3 Generative AI fundamentally changed how the company's salesforce manages its customer relationships. With real-time CRM data, natural language search, and mobile accessibility, reps can now surface account risks earlier, plan sales calls more effectively, and respond to customer concerns in the moment. The organization has shifted from reactive account management to proactive, insight-driven engagement, strengthening customer relationships, improving service quality, and positioning the sales force and the company for sustained growth.

About the Company

- \$9 billion in annual revenue
- Serves approximately half of the physicians and hospitals in the U.S.
- 55,000+ employees

Project Highlights

- 2.5-week initial production deployment implementation
- 3,000,000+ records from customer's CRM system integrated
- Application accessible on both mobile devices and desktop
- 2 user groups with role-based access controls

Proven Results in Initial Production Deployment Visit C3.ai/get-started